

# Oracle<sup>®</sup> iMarketing

Concepts and Procedures

Release 11*i*

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**Oracle iMarketing Concepts and Procedures, Release 11i**

**Part No. A86140-03**

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If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

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# Preface

Welcome to Oracle iMarketing, Release 11i. This *Concepts and Procedures Guide* provides information and instructions to help you work effectively with Oracle iMarketing.

## Intended Audience

This guide is aimed at the following users:

- Technical Service Representatives (TSR)
- Customer Service Representatives (CSR)
- System Administrators (SA), and others with similar responsibility
- Web Site Managers

This guide assumes you have the following pre-requisites:

- Understanding of the company business processes
- Knowledge of products and services as defined by your marketing policies
- Basic understanding of Oracle and Developer/2000

## Related Documents

For more information, see the latest versions of the following manuals:

- *Oracle Marketing Online Concepts and Procedures*
- *Oracle iStore and iMarketing Implementation Guide*
- *Oracle Marketing Online Implementation Guide*
- *Discoverer 3i User Guide*

## Conventions

The following typographic conventions are used in this manual:

<b>Convention</b>	<b>Meaning</b>
<i>italic text</i>	Book titles
Courier text	User commands and file content examples
UPPERCASE	Structured Query Language (SQL) commands, initialization parameters, profile options, responsibilities, or environment variables
<b>boldface text</b>	Menu, button, keyboard, and form options
< >	Angle brackets enclose user-supplied names. Note: Do not type the angle brackets.



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# Understanding Oracle iMarketing

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the relationship of the application to other Oracle or third-party applications.

## Overview of Oracle iMarketing

Oracle iMarketing is a part of the Oracle Applications family, an integrated suite of applications that include both ERP (Enterprise Resource Planning) and CRM (Customer Relationship Management) applications. Oracle Applications are designed to transform traditional businesses into e-businesses.

Oracle iMarketing is an internet marketing application designed to increase online revenues, build customer loyalty, and extend company brand presence to other sites.

iMarketing is a tightly integrated add-on module to Oracle iStore and is not being sold stand alone in this release.

iMarketing works like a personalization engine in the Oracle e-business suite. Merchants can use iMarketing to create and execute marketing campaigns targeted at customer segments on their storefronts. Merchants can also create product recommendations in iMarketing which can be displayed in iStore.

Oracle iMarketing is integrated with Oracle Marketing Online. It leverages its functionality and shares its schema.

Oracle iMarketing helps merchants compete on the online marketplace. Merchants typically use Oracle iMarketing to:

- turn visitors into buyers
- improve customer retention and optimize the order to click-through ratio

- build and solidify customer loyalty into a solid, long-lasting, competitive advantage

## Overview of Oracle iMarketing Functionality

iMarketing provides the following functionality:

- [Segment Management](#)
- [Campaign Management](#)
- [Personalization of the Visitor's Experience](#)
- [Posting Content on an Affiliate's Site](#)

### **Segment Management**

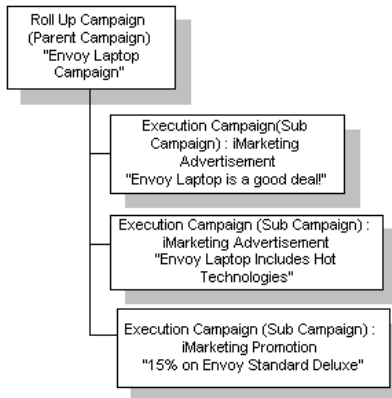
In the present market, the focus has shifted from mass marketing to one-to-one marketing. This new level of customer intimacy is possible due to cheaper and faster data management, interactive media, and the ability to customize marketing campaigns to the individual. The result is the marketer knowing the customer better.

A campaign is refined by targeting people considered most likely to buy or be receptive to a promoted message or product. Within that target population (segment), the campaign can be further tailored to include personalized offers specific to a sub-population.

Segments are created within iMarketing. This segmentation is used by the iMarketing execution engine to personalize the relationship with the visitor.

## Campaign Management

**Figure 1–1 Campaign Hierarchy**



You can define campaigns using iMarketing. These campaigns are executed in iStore. The hierarchical structure of campaigns is described in the following paragraphs.

- **Roll-up Campaigns** is the highest level of campaign in the campaign hierarchy. The roll-up campaign is not executed. It contains the general and higher level information about the campaign. An example of a Roll-up campaign in the campaign hierarchy figure is the *Envoy Laptop campaign*.
- **Execution Campaigns:** You can define campaigns which promote or sell concepts, products, or devices to prospective audiences on the web store using iMarketing. In the campaign hierarchy figure, *Envoy Laptop is a good deal* is an execution campaign targeted to price sensitive visitors and *Envoy Laptop includes hot technologies* is an execution campaign targeted to technology savvy visitors. The iMarketing execution engine displays execution campaigns (advertisements or promotions) in iStore.

For promotions, the merchant defines one or more offers applied during the purchase in iStore. For example:

- Product discounts (% off, \$ off)
- Volume discounts

For more detail on Campaign Management and offers see the latest version of *Oracle Marketing Online Concepts and Procedures*.

### **Personalization of the Visitor's Experience**

By using a rule based technology, iMarketing personalizes the visitor's experience and recommends campaigns or products for the visitor. The merchant defines her own business rules to display in iStore the appropriate campaign or the appropriate product recommendation at the right moment to the right customer.

A campaign can be targeted to deliver a specific message to price sensitive visitors and another campaign can deliver a specific message to technology-savvy visitors.

### **Campaign Recommendation**

As a visitor browses through a site, iMarketing dynamically displays the most appropriate campaign from all campaigns eligible for that customer segment.

This dynamic selection of campaign(s) is done on every web page that is generated, and is sensitive to the context of the customer's browsing session.

For example, the most appropriate time to present a promotion on golf balls is when a visitor is browsing at a golf bag or when a customer adds a golf bag to his/her shopping cart.

### **Product Recommendation**

The merchant can also create rules which select products depending on items being viewed/in the shopping cart. For example, if the user is on the golf bag page, then a list of recommended products cross selling the golf bag can be displayed.

See Understanding Postings and Understanding Rule Sets for more details.

### **Posting Content on an Affiliate's Site**

Oracle iMarketing enables merchants to register affiliates and post content on their site.

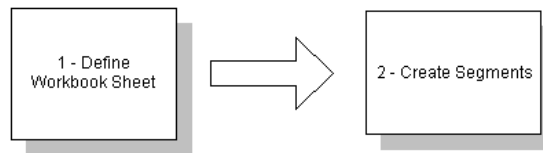
## Oracle iMarketing Process Flow

The main iMarketing functionality are the following:

- Defining an Audience/Segment
- Defining a Campaign
- Defining a Posting and Rule Sets
- Defining an Affiliate

### Defining an Audience/Segment

*Figure 1–2 Segmentation Flow*



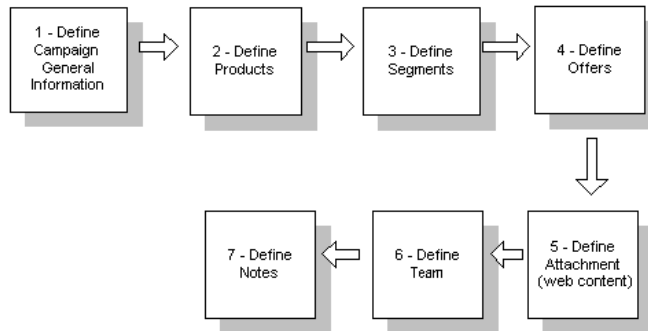
iMarketing provides segmentation functionality as a subset of Marketing Online's audience management functionality.

#### Steps

1. Create a workbook sheet using Oracle Discoverer. A workbook sheet allows you to define a list of visitors. This list includes the people who are most likely to buy or be receptive to a campaign.
2. Create segments.

## Defining a Campaign

**Figure 1–3 Campaign Flow**



iMarketing provides campaign management functionality as a subset of Marketing Online's campaign management functionality. This step is mandatory only when the merchant wants to display personalized campaigns. For product recommendations, you do not have to create campaigns before content recommendation.

With iMarketing you can create campaigns of set-up type Internet Advertisement or Internet Promotions. These two types of campaigns can be displayed on iStore or on an Affiliate's site by the iMarketing execution engine.

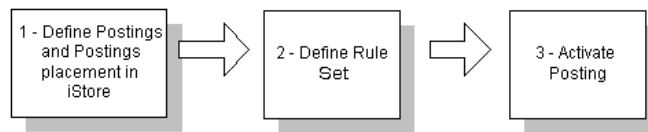
### Steps

1. Define **General** information such as the campaign name, description, source code, status (new, inactive, active...).
2. Define **Products** towards which the campaign is targeted. This information is used by the iMarketing execution engine. (See Understanding Rule Sets).
3. Define **Market** or Segments towards whom the campaign is targeted. This information is used by the iMarketing execution engine. (See Understanding Rule Sets).
4. Define **Offers**. An offer is an incentive such as a product or an order discount. This step exists only for iMarketing promotion campaigns.
5. Define **Attachments** i.e, the web content attached to the Campaign. The web content consists of images and texts. This web content is used by the iMarketing engine to display the campaign on the merchant's web site.

6. Define the **Team** working on this campaign. For more information, see the latest version of *Oracle Marketing Online Concepts and Procedures*.
7. Define **Notes** for this Campaign. See the latest version of *Oracle Marketing Online Concepts and Procedures*.

## Defining a Posting and a Rule Set

**Figure 1–4 Posting and Rule Set Flow**



Postings are personalized content place holders used on your web store or displayed on an affiliate's web site. Postings display personalized campaigns on the web store.

### Steps

1. Define a posting on your web store. You can define inactive postings and place these postings on iStore templates. See Posting API Details in the latest version of *Oracle iStore and iMarketing Implementation Guide* for more information. This step needs to be done only once. iStore has an out of the box posting location for the home page, shopping cart page, section page, and product detail page. See Understanding Postings for more information.
2. Define rule sets. See Understanding Rule Sets for more information.
3. Activate a posting by assigning a rule set and a style sheet to the posting and changing its status to active.

For more information on an affiliate posting, see Understanding Affiliate.

## How Oracle iMarketing Relates to Other CRM Products

iMarketing is integrated with Oracle Marketing Online and Oracle iStore. Merchants who buy both Oracle Marketing Online and iMarketing can define their campaigns from a single user interface.

### Integration with Oracle Marketing Online

Oracle iMarketing integrates tightly with Oracle Marketing Online to allow companies to have consistent marketing practices. Oracle Marketing Online and Oracle iMarketing use common functionality and user interface to create campaigns and segments. Customer segments defined in one application can also be used for campaigns of the other application.

Features shared with Marketing Online (campaign management) are integrated with other CRM and ERP modules such as Pricing Engine and Inventory. Refer to the latest versions of *Oracle Marketing Online Concepts and Procedures* and *Oracle Marketing Online Implementation Guide* for more details.

Oracle iMarketing uses the following information to evaluate segments:

- Customer profile
- Information about the organization the visitor belongs to (in a business-to-business interaction)

### Integration with Oracle iStore

Oracle iMarketing integrates with Oracle iStore to deliver personalized content to the iStore user interface and to provide merchandising functionality. These applications are integrated through Java/JSP API calls and have to be installed on the same application server.

The main integration points are:

- Oracle iMarketing postings are invoked on iStore Java Server Pages. While generating a page, the JSP engine makes a posting call to iMarketing. The visitor profile is used to display the personalized content in the visitor's browser.
- iStore provides contextual information to iMarketing. The information includes: the products being viewed, products in the shopping cart, specialty store, and the customer identifier. As a result, iMarketing generates the HTML for displaying the posting.

## Understanding Segmentation

iMarketing leverages the segmentation functionality of Oracle Marketing Online to enable iMarketing users to define and manage segments. A segment is a group of related visitors. For example, visitors who live in California can belong to the "CA Segment." Oracle iMarketing campaigns can be associated with the segments defined by the merchants. Each campaign can be associated with one or more segments.

Merchants define segments in Oracle Discoverer. Visitors belonging to those segments become eligible for campaigns targeted towards those segments.

Segment structure is hierarchical, and a merchant can create sub-segments within a particular segment.

Each campaign can be associated with one or more segments. Campaigns are then targeted only at segments that they are associated with.

Once logged in, the designated segments apply to the visitor throughout the session.

From eligible campaigns that are available for the customer segment, a campaign is selected for display to the customer depending on the session context, i.e., the page that the customer is currently browsing.

The segment condition applies throughout the session, although different campaigns might be selected, depending on the session context.

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**Note:** You can create an Anonymous Visitor segment to target campaigns to visitors not registered in iStore. All anonymous visitors share the same PARTY ID. The name attribute of this party is IBEGUEST.

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## Guidelines on Creating a Workbook in Oracle Discoverer

Oracle Discoverer is a business intelligence tool that allows you to retrieve and analyze data without having to understand how to access databases.

### Relationship Between Segments and Workbooks

While creating a segment, you must associate a Discoverer workbook sheet with the segment

You can use a Discoverer workbook sheet to define a list of customers (PARTIES of type PERSON).

## Segmentation Process

A batch program (Refresh Party Market Segments) managed by the concurrent manager populates the association between PARTIES (of type PEOPLE) and Segments. The PARTIES - SEGMENTS association (segmentation) is used by Oracle iMarketing during the personalization process to retrieve the list of segments that a visitor belongs to. Based on the list of segments associated with a particular visitor, the list of campaigns that target this specific visitor is dynamically retrieved.

## Workbook Creation

An Oracle iMarketing user who creates a segment must also create a workbook sheet using Oracle Discoverer. For more details, refer to the latest version of *Discoverer 3i User Guide*.

1. To launch Oracle Discoverer, click the **Web Discoverer** link on the Create Segment screen, or Segment Details screen.
2. To create a workbook sheet, use the Oracle Marketing business area. This business area contains folders needed to complete workbook creation. The workbook sheets are used later for the segmentation process. While creating a workbook, ensure that:
  - The table display is used to select data
  - At least one item called PARTY ID is included in the list of selected items
  - The workbook is saved in the database

## Business Area Tips and Hints

Oracle Marketing Online provides a Discoverer business area. Using the Oracle Marketing Online business area with associated folders, a marketer can choose from a wide range of selection criteria based on the following parameters:

- business
- business history
- customer demographic
- previous responses to solicitations

## Business to Consumer Segmentation Guidelines

- Select the PARTY ID item from the folder containing PARTY of type PERSON.
- Apply selection on the party's profile (customer's profile) to generate the query.

### Business to Business Segmentation Guidelines

- Select the PARTY ID item from the folder containing PARTY of type PERSON.
- If needed, select any column from the folder related to the ORGANIZATION (for the selected PARTIES of type organization). In this case, the PARTY of type PERSON is an employee of the Organization.
- You can apply selection criteria on the customer's profile and on the organization's profile to generate this query.

## Understanding Campaigns

A campaign consists of a set of messages delivered during a defined period to an audience. A campaign in iMarketing can be displayed on a merchant's own site or on an affiliate site.

Some campaigns may have target products associated with it, while others might not have target products associated with it, e.g, a brand awareness campaign. Target products can be assigned to any kind of campaigns.

Campaigns can be:

- **Advertisements:** campaigns that present content to customers, but do not have an offer associated with it.
- **Promotions:** campaigns in which offers can be attached. An offer might be:
  - a discount on products
  - a discount on the total order
  - a free product Y when you buy two of product X

When you create an iMarketing campaign, the following information is considered by the iMarketing execution engine.

1. **General Information About a Campaign** such as the campaign name, description, source code, status (new, inactive, active...). The iMarketing execution engine uses the start and end date and the status of the campaign for processing. Only active campaigns with a valid start and end date are displayed in iMarketing.
2. **Products** towards which the campaign is targeted. This information is used by the iMarketing execution engine.
3. **Segments** with which the campaign is associated. This information is used by the iMarketing execution engine (see Understanding Rule Sets).

4. **Attachments** define web content attached to the campaign (images and texts). See the latest version of *Oracle Marketing Online Concepts and Procedures* for details.

## Understanding Advertisements

An advertisement is a campaign type without an associated offer. For example, a brand awareness campaign or a product advertisement. Advertisements may or may not be linked to products.

An Advertisement appears on local and affiliate sites. An advertisement can link to

- various site locations
- a product page

An advertisement can also perform actions like

- add an item to the shopping cart
- display the cart

## Understanding Promotions

A promotion is a specific type of campaign that offers a product discount. It impacts the price of an item purchased or the order amount during the checkout process. A promotion can be associated with one or more offers.

You may want to promote offers that have the same marketing message. For doing this, you can create a promotion of an internet campaign type with multiple offers attached to it. If you want to promote multiple offers that have different marketing messages, then you should create one internet promotion campaign per offer. For example:

- create one promotion campaign: *5% on Standard Envoy Laptop* and define under this campaign one offer: *5% discount on the Standard Envoy Laptop*.
- define one promotion campaign: *Great discount on all Envoy Laptops* and define under this campaign two offers: *a 10% discount on the Standard Envoy Laptop and a 5% discount on the Deluxe Envoy Laptop*.

Offer types include:

- **Product Discount:** linked with a target product to reduce product price
- **Add Free Product:** linked with a target product to add one or more free products to the order

- **Order Discount:** reduces the order's total cost

For more information about offer types, see the latest *Oracle Marketing Online Concepts and Procedures*.

## Understanding Content For Campaign Selection

Content, consisting of images and text can be created for campaigns from iMarketing's Create Content screen. Content rendering is the way in which content is presented on a specific location of the merchant's or on an affiliate's web site.

Content rendering processing is done by the Oracle XML parser which applies a XSL style sheet to the XML structure returned by iMarketing.

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**Note:** XSL is an eXtended StyLe style sheet that is defined at the posting level. This file is stored on the local file system of the application.

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You can associate content (text, image) to a campaign from the Create Content screen. Enter data in the following fields:

- **File Name (Image Only)** is the name of the file containing the content. All content, including textual content is contained in files.
- **Location (Image Only)** is the Location of the file. If this field is left blank, Location points to the/OA\_MEDIA/ virtual directory. If the user enters a path, the file is retrieved from the web server virtual directory specified in the path. If the user enters a URL, content is retrieved from this URL.
- **Type** is the type of content. Oracle iMarketing supports text and image content. The content type string gives details on the type of content (text, image).
- **Sub Type** includes semantics associated with content. For **text**, use the following:
  - **Short Description:** of the campaign, 40 characters or less. The user decides this length, and no control is imposed by Oracle iMarketing.
  - **Description:** of the campaign. It has to be 120 characters or less. The user decides the length and no control is imposed by Oracle iMarketing.
  - **Long Description:** of the campaign. The user decides the length and no control is imposed by Oracle iMarketing.

- **For Images**, use the content types specified in the Image Details table. Banner names and sizes come from the IAB/CASIE Advertising banner size standard. Refer to <http://www.iab.net> for IAB/CASIE Advertising banner size standard.

The following table gives the image details for content.

**Table 1–1 Image Details**

Content Type	Description	Size
Image	Full Banner	Banner of 468 by 60 pixels.
Image	Half Banner	Banner of 234 by 60 pixels.
Image	Vertical Banner	Banner of 120 by 240 pixels.
Image	Button1	Banner of 120 by 90 pixels.
Image	Button2	Banner of 120 by 60 pixels.
Image	Square Button	Banner of 125 by 125 pixels.
Image	Micro Button	Banner of 88 by 31 pixels.

- **Width and Height (Image Only)** For image content, width and height are in pixels.
- **Language** The content is associated to a specific language.
- The **Preview** button enables the user to preview content.

### How Content is Retrieved and Displayed in a Style Sheet

When a posting is executed, the posting selects the correct content by selecting the appropriate content type defined for the user language.

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**Note:** A style sheet can include processing to pick another content if the required content is not defined for the selected campaign.

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### Organizing Style Sheets and Content Associated With My Campaigns

Oracle iMarketing does not impose any control over the list of content defined for a campaign. A minimal list of content type should be defined for each campaign to enable multiple style sheets to display the campaign in multiple postings. Examples of content type include:

- Text - Short Description
- Image - Full Banner
- Image - Square Button

The style sheet must be designed to handle cases where a specific content type is not defined for the selected campaign.

## Understanding Campaign Selection

Selecting and presenting campaigns and content that is relevant to a customer segment is important for attracting and retaining customers and for stimulating purchases. As a customer browses through the different screens on a site, iMarketing dynamically selects the campaign to be displayed from all campaigns eligible for the customer's market segment.

The following selection criteria can be used:

- **Specific list of campaigns:** campaigns are picked randomly in the defined list.
- **Campaigns relevant to the shopping context:** iMarketing retrieves campaigns matching the visitor's profile (segments) and the shopping context (products being viewed or products in the shopping cart).

### **Guidelines on Selecting Campaigns Relevant to the Shopping Context**

The following table describes the various campaign types relevant to the shopping context.

**Table 1–2 Campaigns Relevant to the Shopping Context**

<b>Selected Campaign Type</b>	<b>Selected Shopping Context</b>	<b>How Campaigns Relate to products</b>	<b>String Displayed in the Rule Set detail Page</b>	<b>Description</b>
Advertisements	Products being viewed	Promoting	Advertisements promoting products being viewed.	Select advertisements related to the product(s) being viewed and targeted to any of the user's segments.
Advertisements	Products being viewed	Cross-selling	Advertisements cross-selling products being viewed.	Select advertisements cross-selling the products being viewed and targeted to the user's segments.
Advertisements	Products being viewed	Up-selling	Advertisements up-selling products being viewed.	Select advertisements up selling the products being viewed and targeted to any of the user's segments.
Advertisements	Products in the shopping cart	Promoting	Advertisements promoting products in the shopping cart.	Select advertisements promoting the products in the shopping cart and targeted to any of the user's segments.
Advertisements	Products in the shopping cart	Cross selling	Advertisements cross-selling products in the shopping cart.	Select advertisements cross-selling the products in the shopping cart and targeted to any of the user's segments.
Advertisements	Products in the shopping cart	Up-selling	Advertisements up-selling products in the shopping cart.	Select advertisements up-selling the products in the shopping cart and targeted to any of the user's segments.
Advertisements	Any product- all eligible campaigns	N/A	Any eligible advertisement	Selects advertisements targeted to any of the user's segments.
Same for Promotions. In Campaign Type, select only Promotions.  Advertisements and Promotions In campaign type, Select Advertisements and Promotions.				

## Understanding Product Selection

Selecting the appropriate products in context is important for stimulating new purchases. As a customer browses through the different screens on a web site, iMarketing can dynamically display the appropriate product recommendation. The product selection can be used in rule sets returning the product content type.

iMarketing uses the following information to display a product selection criteria:

- products being defined in the iStore product catalog
- content being associated with each product in iStore (description, images)
- relationship defined in the iStore administration interface (cross sell, up sell, service, etc.)
- shopping context (products being displayed or products in the shopping cart)

The product selection criteria leverages product relationships defined in iStore and provides an effective and fast way to deliver product recommendations to the visitor based on the shopping context. Custom relationships defined in iStore enable sophisticated product recommendation strategies.

For example, if a visitor is viewing a screen about a book, the merchant can set up a relationship and a rule to recommend books from the same author. If there are no books from the same author, the next rule can recommend books on the same theme by assuming that there is a relationship to group books from the same author and books with the same theme.

### Guidelines on Selecting Products Relevant to the Shopping Context

The following table describes the various product types relevant to the shopping context.

**Table 1–3 Products Relevant to the Shopping Context**

<b>Shopping Context</b>	<b>Relationship</b>	<b>String displayed in the rule set detail page</b>	<b>Description</b>
Products being viewed	Cross sell	Cross sell for products being viewed.	Display a list of recommended products cross selling products being viewed.
Products being viewed	Up sell	Up sell for products being viewed.	Display a list of recommended products up selling products being viewed.
Products being viewed	Any other relationship	Relationship name for products being viewed.	Display a list of recommended products related to products being viewed.
Products in the shopping cart	Cross sell	Cross sell for products in the shopping cart.	Display a list of recommended products cross selling products in the shopping cart.
Products in the shopping cart	Up sell	Up sell for products in the shopping cart.	Display a list of recommended products up selling products in the shopping cart.
Products in the shopping cart	Any other relationship	Relationship name for products in the shopping cart.	Display a list of recommended products related to products in the shopping cart.

## Understanding Postings

A posting is a personalized placeholder for content. The page on which the posting resides is called the calling page. The posting can reside on your site or on an affiliate site. A posting serves as a container through which a campaign or product is displayed. The content inside the posting is selected by a rule set.

A posting can be called from any Java Server Page (JSP) template, including an iStore template.

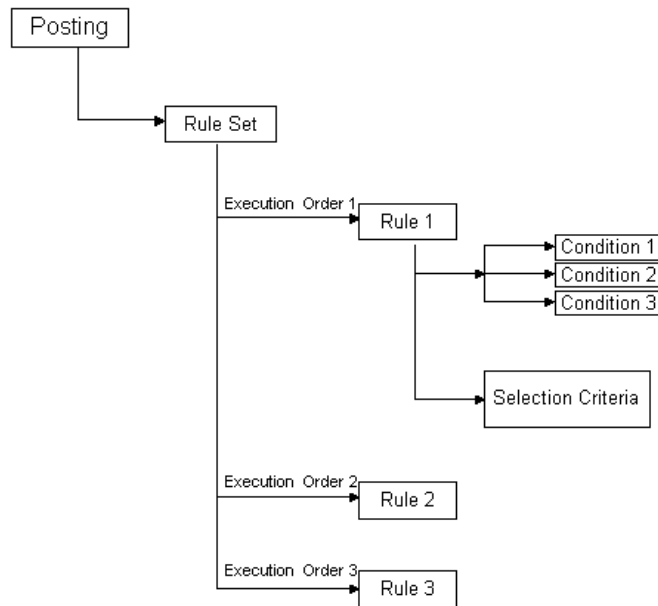
The rule set selected for a posting is responsible for selecting a personalized campaign or a personalized product recommendation for display.

Content rendering is the way that content (text, images) is rendered on a specific location on the merchant's web site or on an affiliate's web site for a campaign.

Content rendering processing is done by the Oracle XML parser that applies a XSL style sheet to the XML structure returned by Oracle iMarketing.

The Posting API returns HTML. The posting style sheet is applied to the XML structure to generate this HTML. This is the actual content returned for display to the user.

A posting returns nothing if the posting status is inactive.

**Figure 1–5 Posting and Rule Set Flow**

## Understanding Rule Sets

A rule set consists of multiple rules that are used by the iMarketing execution engine to select content. When you create a rule set, you have to select the content type to be displayed.

A rule can have one or more conditions but only one selection criteria. If a rule has multiple conditions, then each condition must be evaluated to **true** for the selection criteria to be executed. A rule always returns the content type defined at the rule set level. For example, if you create a rule set with the content type of product, then any rule within this rule set will have product content type.

The rule set is dynamically evaluated when the page is generated for display. A rule set is associated with a posting which can be called from any Java Server Page (JSP) template, including an iStore template.

A rule consists of

- an execution order

- a condition(s)
- a selection criteria returning a specific content type (campaigns or products)

A rule can have one or more conditions but only one selection criteria. If a rule has multiple conditions, then each condition must be evaluated to **true** for the selection criteria to be executed.

### Example

For a given customer, the following conditions and selection criteria apply:

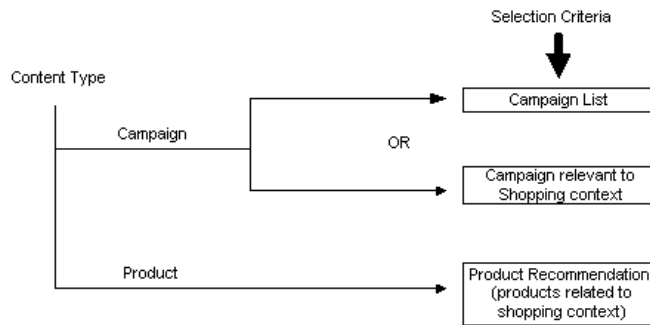
*Table 1–4 Example of condition and selection criteria*

Condition	Selection Criteria
Visitor belongs to the teenage segment	Access a predefined list of campaigns.
Visitor is registered	Select advertisements promoting products in the shopping context.

Oracle iMarketing supports four types of conditions:

- **visitor type**: anonymous, registered with order history, or registered without order history.
- **specialty store**: store(s) that the visitor is currently browsing (condition is **true** if the visitor is in any specialty store specified at the condition level).
- **customer segment**: segment(s) that the visitor belongs to (condition is **true** if the visitor belongs to any segment specified at the condition level).
- **empty shopping cart**: this condition can be used to check if the shopping cart is empty.

**Figure 1–6 Relationship Between Content Type and Selection Criteria**



Two types of selection criteria are available (for a rule set with a campaign content type):

- **Specific list of campaigns:** A list of campaigns defined by the merchant
- **Campaigns relevant to shopping context:** Returns a set of campaigns based on user’s shopping context (products being viewed, products in the shopping cart, and visitor’s profile)

One selection criteria exists for a rule set having the product content type. It is **Product Relevant to Shopping Context**. This content selection is done implicitly and you do not have to do any action.

### How Rule Sets are Evaluated by Oracle iMarketing

1. When a posting is called, the number of campaigns or products to be retrieved (N) is sent to the rule set for processing.
2. The rule having the highest execution order is executed first.
3. If all conditions are true for the first rule, then the selection criteria is evaluated and x campaigns are returned.
4. If x is less than N ( $x < N$ ), then the next rule is evaluated. N minus x ( $N - x$ ) campaigns remain to be retrieved.
5. When  $x = N$ , then stop rule processing.
6. If the condition is false for rule one, then the next rule is evaluated.

**Example: Targeting Advertisements on the Home page**

The merchant wants to display an advertisement for a seminar targeted towards the Gold Account segment.

If the person browsing the site is anonymous, then a specific advertisement, selected from the Specific List of Campaigns is displayed. In this case, the campaigns that are displayed do not depend on the browsing context.

In this case, the **Specific List of Campaigns** selection criteria must be used.

The rule set is:

- **Rule 1:** If a visitor belongs to Gold Account segment, then display an iMarketing Gold advertisement.
- **Rule 2:** If a visitor is anonymous, then display an iMarketing Bronze advertisement.

**Example: Targeting Promotions Depending on the Browsing Context**

The merchant wants to display an internet offer campaign related to the product being viewed and the appropriate user segment.

If no user segment is available, the merchant wants to display an internet promotion campaign targeted to the customer segment. Offers returned first are campaigns with the highest priority. If no promotion is available, then display Default Campaign for Anonymous Customers.

The rule set is:

- **Rule 1:** If a visitor is registered, then display **promotions promoting products being viewed**.
- **Rule 2:** If a visitor is registered, then display campaigns returned by **any promotions** selection criteria.
- **Rule 3:** If a visitor is anonymous, then display **Default Campaign for Anonymous Customers**.

The merchant displays a posting showing an internet promotion campaign appropriate to the product being viewed. The posting provides more information than the value of the discount that is displayed in iStore.

The posting may also display a marketing message urging the customer to buy the product immediately. For example, *a great promotion on a printer. Valid through the end of the month. Buy now! Get a free scanner if you purchase this printer.*

**Example: Display a Product Recommendation Up Selling or Cross Selling Products**

The merchant wants to display a product recommendation up selling products in the shopping cart. If there are no products in the shopping cart, then the merchant wants to display products up selling products being displayed on the current page.

The rule set is:

**Rule 1:** If a shopping cart is empty, then recommend products up selling products being displayed.

**Rule 2:** If the customer is registered, then recommend products up selling products in the shopping cart.

**Rule 3:** If the customer is anonymous, then recommend products up selling products in the shopping cart.

## Understanding Affiliates

An affiliate is a third party site that is used to direct internet traffic to the merchant's web store.

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**Note:** An affiliate's user is considered an anonymous user by the iMarketing execution engine.

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### Posting Campaigns on Affiliate Sites

- registering and managing affiliates and postings
- selecting campaigns for display
- dynamically distributing up-to-date content

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**Note:** Presently, content being delivered by affiliate postings is the campaign content type and the content selector is List of Campaigns. The style sheet used for delivering content to affiliate's site is ibacpns1.xsl. This style sheet generates a full banner but does not deliver rich media content.

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### Steps To Be Done By The Merchant During Definition Time:

1. Register an affiliate in iMarketing.

2. Create and associate a posting to an affiliate.
3. If a posting is targeted to an affiliate, then HTML content is generated.
4. The HTML content that is generated is sent to the affiliate. The affiliate includes this content on his/her web pages.

**Steps To Be Done By The iMarketing Engine During Execution Time:**

1. The affiliate displays the page that includes the HTML content generated by iMarketing.
2. This HTML content dynamically calls the iMarketing execution engine which returns the appropriate campaign. This dynamic call uses javascript (if the user's browser supports javascript), otherwise a default banner is displayed by the affiliate's site.

## Style Sheets for Campaigns and Products

iMarketing uses style sheets to define the type of content (image, text etc.) that will be displayed and how it will be displayed. The style sheet specification is used to describe a style sheet which processes the XML content delivered by iMarketing and generates HTML for rendering.

Style sheets are defined at the posting level.

**Style Sheets for Campaigns**

There are three style sheets for Campaigns. These style sheets select the Attachment Subtypes for rendering. These style sheets are described below:

1. `ibacpns1.xml`: This style sheet selects one of the following attachment subtypes:
  - `IMG_FULL_BANNER`
  - `IMG_HLF_BANNER`
  - `TXT_DESC`
2. `ibacpns2.xml`: This style sheet selects one of the following attachment subtypes:
  - `IMG_MICRO_BUTTON`
  - `TXT_DESC`
  - `TXT_LONG_DESC`

3. `ibacpnm3.xml`: This style sheet selects one of the following attachment subtypes. This stylesheet can be used for multiple campaign selection.
  - `IMG_MICRO_BUTTON`
  - `TXT_DESC`.

The attachment sub types starting with `IMG` refers to images. If there is a campaign with an attachment subtype not listed above (for example, `IMG_BUTTON1`), you can change the template rule that matches the campaign and looks for an attachment subtypes of `IMG_BUTTON1`.

You have to have a style sheet for-each clause for the new Attachment subtype. Close the `<xsl:for-each ...>` element with a corresponding `</xsl:for-each>` element. The following example shows a sample of the style sheet used for selecting the attachment subtypes for rendering.

```
<xsl:for-each select="AttachmentList/Attachment [starts-
  with(AttachmentSubType, 'IMG_BUTTON1)] ">
  <tr>
    <td>
      <xsl:call-template name="IMAGE"/>
    </td>
  </tr>
</xsl:for-each>
```

A template named `IMAGE` is supposed to be present in the style sheet file. The above procedure can be followed for all other attachment sub-types for images like `IMG_BUTTON2`, `IMG_SQUARE_BUTTON`, `IMG_VERTICAL_BANNER` etc.

### Style Sheets for Products

There are four Product related style sheets.

1. `ibaproduct1.xml`: This stylesheet shows `ProductDetailLink` and `ShortDescription`.
2. `ibaproduct2.xml`: This stylesheet shows `ThumbNail image`, `ShortDescription`, and `ProductDetailLink`.
3. `ibaproduct3.xml`: This stylesheet shows `ThumbNail image`, `ShortDescription`, `Description`, and `ShoppingCartLink`.
4. `ibaproduct4.xml`: This stylesheet shows `Small Image`, `ShortDescription`, `Description`, and `ShoppingCart Link`.

### Product Properties in Style Sheets

The properties of a Product object accessible from the style sheets are:

- Short Description
- Description
- Product Detail Link
- Shopping Cart Link
- ThumbNail
- Small Image
- Large Image

Usually, a product has a Short Description and a Description. It also has a ProductDetailLink. The media content (short description, description, thumbnail, small image, large image) have to be defined in the iStore Administration user interface.

A product can also have a ShoppingCart Link if prices are defined. From the ShoppingCart Link you can go to the Shopping Cart page. To define prices for Products, see the latest version of *Oracle iStore Concepts and Procedures*.

For images, a product should have display contexts with the following titles:

- **THUMBNAIL**: it is a multimedia component to be defined by the merchant.

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**Note:** THUMBNAIL multimedia component should be defined in all caps for the programatic access name.

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- **STORE\_PRODUCT\_SMALL\_IMAGE**: this is defined in iStore. See the latest version of *Oracle iStore Concepts and Procedures* for more information.
- **STORE\_PRODUCT\_LARGE\_IMAGE**: this is defined in store. See the latest version of *Oracle iStore Concepts and Procedures* for more information.

After defining the appropriate multi media component, a merchant has to create images for products that he wants to recommend. To attach an image for any of these components, navigate to iStore Admin UI

In the existing style sheets, where some child attribute are accessed from within a product rule by entering **child::**, you can replace it by another child attribute. e.g, **the child::ThumbNail** reference in *ibapro2.xml* and *ibapro3.xml* can be replaced by **child::SmallImage** or **child::LargeImage**.

You should not change **child::ShortDescription** by **child::ThumbNail** because this will display an image where text is being displayed.

You can change **child::ShortDescription** by **child::Description** because the changes are of similar type. The following example shows you how to display a `SmallImage` of a Product.

```
        <xsl:element name="a">
<xsl:element name="img">
  <xsl:attribute name="src">
    <xsl:value-of select="child::SmallImage"/>
  </xsl:attribute>
  <xsl:attribute name="alt">
    <xsl:text></xsl:text>
  </xsl:attribute>
  <xsl:attribute name="border">
    <xsl:text>0</xsl:text>
  </xsl:attribute>
</xsl:element>
</xsl:element>
```

---

---

# Using Oracle iMarketing

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

This chapter covers overall Navigator and screen functionality, and explains how to use the fields and other elements within screens.

## Managing Segments

You can view segment details on Segment Details screen and create segments on Create Segment screen. This functionality is available both on Oracle Marketing Online and Oracle iMarketing user interfaces.

For Creating and Updating Segments, see the latest version of *Oracle Marketing Online Concepts and Procedures*.

## Managing Campaigns

For more information about Creating and Updating Campaigns, see the latest version of *Oracle Marketing Online Concepts and Procedures*.

## Creating a Posting

Use this procedure to create a posting from the Create Postings screen.

### Prerequisites

The user must have user permissions.

## Steps

1. In the Posting tab, choose **Posting**. The Postings screen appears listing the details defined by the merchant.
2. Click **Create**. The Create Posting screen appears.
3. Enter the posting **Name**.
4. Enter a **Description** for the posting.
5. In **Posting On** list:
  - a. Select **Store** to post on the merchant store. **Or**
  - b. Select **Affiliate Site** to post on an affiliate site. ([Selecting an Affiliate Site](#)).

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**Note:** When a posting is created for an affiliate, an additional Affiliate Content section also appears on the Posting Detail screen. This section includes the HTML content that has to be placed on the affiliate's site.

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6. Assign the **Status** as Active or Inactive. The default status is Inactive.

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**Note:** For campaigns to appear in postings during runtime, the campaign status should be "Active." For more information on campaigns, see the latest version of *Oracle Marketing Online Concepts and Procedures*.

---

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7. In the **Content Detail** section, enter or search for the rule set to be used. To select a rule set, click **Go**. Rule Sets screen appears.
8. Select a Rule Set by clicking the desired rule set in the **Name** column. Create Posting screen appears with the selected rule set appearing on the Rule Set field.
9. Enter the XSL style sheet name in the **Rendering Style** field to assemble content for this posting.

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---

**Note:** XSL is an eXtended StyLe sheet defined at the posting level. The rule set and style sheet are only mandatory if the posting status is set to active.

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10. Click **Create**. Your new posting is saved.

## Viewing or Editing a Posting

### Prerequisites

The user must have user permissions.

### Steps

1. In the Posting tab, choose **Posting**. The Postings screen appears listing the details defined by the merchant.
2. To review details for a posting or to edit information, click the hyperlink for the posting **Name**. The posting details screen appears displaying information for the selected posting.

## Selecting an Affiliate Site

Use this procedure to select an affiliate site on the Create Posting screen.

### Prerequisites

Complete the initial steps for creating a posting.

### Steps

1. In the **Posting On** field, select **Affiliate Site** to post on an affiliate site. An additional field appears.
2. Click **Go**. Affiliate screen appears with a list of available affiliates.
3. Click an affiliate name that you want to select. Create Posting screen appears with selected affiliate name added in the additional field.

## Managing Rule Sets and Rules

A rule set consists of multiple rules that are used by the iMarketing execution engine to select a campaign.

A rule can have one or more conditions but only one selection criteria. If a rule has multiple conditions, then each condition must be evaluated to **true** for the selection criteria to be executed.

The rule set is dynamically evaluated when the page is generated for display. A rule set is associated with a posting which can be called from any Java Server Page (JSP) template, including an iStore template.

A rule consists of

- an execution order
- a condition(s)
- a selection criteria

A rule can have one or more conditions but only one selection criteria. If a rule has multiple conditions, then each condition must be evaluated to **true** for the selection criteria to be executed.

Oracle iMarketing supports four types of conditions:

- **visitor type: anonymous, registered with order history, or registered without order history.**
- **specialty store:** store(s) that the visitor is currently browsing (condition is **true** if the visitor is in any specialty store specified at the condition level).
- **customer segment:** segment(s) that the visitor belongs to (condition is **true** if the visitor belongs to any segment specified at the condition level).
- **empty shopping cart:** this condition can be used to check if the shopping cart is empty.

Two types of selection criteria are available:

- **Specific list of campaigns:** A list of campaigns defined by the merchant.
- **Campaigns relevant to shopping context:** Returns a set of campaigns based on user's shopping context (products being viewed, products in the shopping cart, and visitor's profile).

### How Rule Sets are Evaluated by Oracle iMarketing

1. When a posting is called, the number of campaigns to be retrieved (N) is passed to the rule set for processing.
2. The rule having the highest execution order is executed first.
3. If all conditions are true for the first rule, then the selection criteria is evaluated and x campaigns are returned.
4. If x is less than N ( $x < N$ ), then the next rule is evaluated. N minus x (N-x) campaigns remain to be retrieved.
5. When  $x=N$ , then stop rule processing.
6. If the condition is false for rule one, then the next rule is evaluated.

## Creating Rule Sets

Use this procedure to create rule sets from the Create Rule Set screen.

### Prerequisites

None

### Steps

1. In the Posting tab, choose **Rule Set**.  
Rule Sets screen appears listing existing rule sets.
2. Click **Create**.  
The Create Rule Set screen appears.
3. Enter a **Rule Set Name** and **Description** for the rule set.  
In the description field, the merchant can enter the rule set meaning and guidelines on how to use it.  
Examples of what the merchant's web site manager might add, include:
  - \* the meaning of the rule set, i.e, what the rule set is expected to return
  - \* where and when this rule set should be used
  - \* what does the merchant imply by shopping context; is it products being viewed or products in the shopping cart
4. In the Content section, select either campaign or product button for Content Type. See [Selecting Content](#).

5. Enter a positive integer in the Maximum Number of Content Displayed field. This number determines the maximum number of objects (campaigns or products) that will be displayed.
6. Click **Create**. Rule Sets screen appears listing the new rule set.

## Creating Rules

Use this procedure to create a rule on the Edit Rule screen.

For creating a rule, the merchant defines the conditions and selection criteria (or "action" upon which the rule is executed, if conditions are true).

### Prerequisites

A Rule Set has been created.

### Steps

1. In the Posting tab, choose **Rule Set**. Rule Sets screen appears listing the existing rule sets.
2. To create another rule for an existing rule set, click the **Name** hyperlink. Rule Set Detail screen appears.
3. Click **Add New Rule**. Edit Rule screen appears.
4. Enter a **Rule Name**, **Execution Order**, and **Description** for the rule.

---

---

**Note:** The Execution Order for a rule has to be 1 or greater than 1.

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5. Depending on the content type selected in the Create Rule Set screen, either Content Selection or Product Selection section appears. Make adequate selections. See [Selecting Content](#).
6. In the Conditions section, select one or more condition types from the following sub sections. See [Selecting A Condition](#).
  - condition regarding customer segment
  - condition for specialty store
  - condition regarding visitor type
  - condition for shopping cart

7. Depending on the Condition Type selected, make adequate selections to complete the process of selecting a condition. Click **Done**.

---

---

**Note:** You can add more than one condition for a rule.

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8. Rule Set Detail screen appears with the details for the new rule that you created appearing in the Rules section.

## Selecting A Condition

One or more condition(s) for a rule can be selected from the Conditions section of the Edit Rule screen. The following Condition Types are available :

- condition regarding customer segment
- condition for specialty store
- condition regarding visitor type
- condition for shopping cart

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---

**Note:** A Rule can have multiple conditions. Conditions are combined with an AND operator.

---

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## Selecting a Condition Regarding Customer Segment

Use this procedure to select a condition regarding customer segment from the Edit Rule screen.

### Prerequisites

Complete the initial steps of creating a rule on the Edit Rule screen.

### Steps

1. In the Conditions section on the Edit Rule screen, navigate to **customer segment** section.
2. Click the **Add** button.
3. Customer Segment screen appears. Select one or more segment to be included from the list available by checking the adjoining checkbox in the Add column. Click **Add**.

4. Edit Rule screen appears with the customer segments added in the Customer Segment section.

## Selecting a Condition for a Specialty Store

Use this procedure to select a condition for a specialty store from the Edit Rule screen.

### Prerequisites

Complete the initial steps of creating a rule on the Create Rule screen.

### Steps

1. In the Conditions section on the Edit Rule screen, navigate to **specialty store** sub section.
2. Specialty Store screen appears. Check the box associated with the specialty store to be added in the **Add** column. Click **Add**.
3. Edit Rule screen appears with the specialty store added appearing in the Specialty Store sub section.

## Selecting a Condition Regarding the Visitor Type

Use this procedure to select a condition regarding the visitor type from the Edit Rule screen.

### Prerequisites

Complete the initial steps of creating a rule on the Edit Rule screen.

### Steps

1. In the Conditions section on the Edit Rule screen, navigate to **visitor type** sub section.
2. Select either **Registered, with order history; Registered, no order history; Anonymous; or IBA\_None** radio button.

---

## Selecting a Condition for Shopping Cart

Use this procedure to select a condition for Empty Shopping Cart from the Edit Rule screen.

### Prerequisites

Complete the initial steps of creating a rule on the Edit Rule screen.

### Steps

1. In the Conditions section on the Edit Rule screen, navigate to **shopping cart** sub section.
2. To include the condition for an empty shopping cart, click the Condition for Empty Shopping Cart checkbox.

## Selecting Content

Select content type of either product or campaign on the Create Rule Set screen.

For a campaign content type, select from the following two types of campaigns.

- specific list of campaigns
- campaigns relevant to the shopping context

For a product content type, see Selecting Product Content Type.

## Selecting Specific List of Campaigns

Use this procedure to choose a selection criteria for selecting a specific list of campaigns.

### Prerequisites

Complete the initial steps of creating a rule set.

### Steps

1. In the Content section of the Create Rule Set screen, select the Campaign button.
2. Enter a positive integer in the Maximum number of content displayed field. Click **Add New Rule**.
3. Complete the initial steps for creating a rule.

4. In the **Content Selection** section of the Edit Rule screen, select **Specific List of Campaigns**. Click **Go**. A table displaying selected campaigns appears.
5. Click **Add**. Campaigns screen appears listing all the campaigns.
6. Select a campaign and click **Add**.
7. Edit Rule screen appears with the details of the selected campaigns. You can either add another campaign or continue with the other sections of creating a rule.

---

---

**Note:** The merchant chooses

- one specific campaign to display, or
- a list of campaigns (to enable a kind of campaign rotation).

The merchant manages the list and controls its consistency and coherency.

The algorithm used to get campaigns from a "specific list of campaigns" consists of a list of N campaigns:

The rule engine requests X campaigns from the specific list of campaigns selection criteria.

- If  $x < N$ , selection criteria returns X campaigns picked randomly from the list of N campaigns.
- If  $x \geq N$ , selection criteria returns X campaigns.

A control is enforced. The returned campaigns are active and the current date is between the campaign start and end date.

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---

## Selecting Campaigns Relevant to Shopping Context

Use this procedure to choose a selection criteria for selecting campaigns relevant to the shopping context.

### Prerequisites

Complete the initial steps of creating a rule set.

### Steps

1. In the Content section of the Create Rule Set screen, select the Campaign button.
2. Enter a positive integer in the Maximum number of content displayed field. Click **Add New Rule**.

3. In the **Content Selection** section of the Edit Rule screen, select **Campaigns Relevant to Shopping Context**. Click **Go**. See [Guidelines on Selecting Campaigns Relevant to the Shopping Context](#).
4. Select a campaign type-Promotions, Advertisements, or both.
5. Select the product context from the **Product Context** drop-down list.
6. Select a relationship from the **Relationship** drop-down list and click **Done**.
7. Continue with the other sections of creating a rule.

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---

**Note:** Cross-sell and up-sell are available from every page but the home page in iMarketing.

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## Selecting Product Content Type

Use this procedure to select the Product content type from the Create Rule Set screen.

### Prerequisites

Complete the initial steps for creating a rule set.

### Steps

1. In the Content section, select the **Product** button.
2. Enter a positive integer in the Maximum number of content displayed field.
3. Click **Add New Rule** button. Edit Rule screen appears. Complete the initial steps for creating a rule.
4. In the Product Selection section, select a Product Context from the list.
5. Select a Relationship from the list. Continue with the other sections of creating a rule.

## Managing Affiliates

Affiliates are third parties (subsidiaries, suppliers, ad networks, etc.) that participate in a merchant campaign. Use this procedure to update information about your affiliates and to add new affiliates.

### Delivering Postings to Affiliates

For postings to be delivered to affiliates users, some HTML content is generated and displayed in the posting screen. For this to occur, HTML content must be placed on the affiliate site to call a posting. A merchant can email this HTML to the affiliate or display HTML content in a web self service application.

When executed on a browser by affiliate end-users, this HTML code returns the corresponding HTML content and/or images to be displayed by the browser. The page is assembled by the user's browser. It mixes content from the affiliate site and content from the merchant site through a call to Oracle iMarketing.

This delivery mechanism is useful in the following ways:

- requires no development effort at the affiliate site
- can be used even within static web pages
- easy to use with HTML authoring tools

## Creating an Affiliate

Use this procedure to set up an affiliate site on which you will display your campaign.

### Prerequisites

The user must have user permissions.

### Steps

1. Click the Affiliate tab. Affiliate screen appears.
2. Click **Create**. Create Affiliate screen appears.
3. Enter an Affiliate name in the Affiliate field and address information in the company information section.
4. Click **Create**.

## Viewing or Editing an Affiliate

Use this procedure to view or edit an affiliate on the Affiliates screen. Affiliates cannot be deleted.

### Prerequisites

The user must have user permissions.

### Steps

1. In the Affiliate tab, choose **Affiliate**. Affiliate screen appears displaying a list of current affiliates.
2. To review details for an affiliate or to edit information, click the hyperlink **Affiliate Name**. The Affiliate Details screen appears and shows address information for the selected affiliate.
3. To edit information, make the requisite changes in the required field(s) and click **Update**. Affiliate screen appears.

## Creating Content (Attachments)

You can associate content (text, image) to a campaign in the Create Content screen. Use this procedure to create content from the Create Content screen.

### Prerequisites

- Account in Oracle Marketing Online.
- User permissions in iMarketing.

### Steps

1. Click the Campaign tab. Campaigns screen appears.
2. Click the name of the campaign for which you want to view the details. Campaign Details screen appears with the details.
3. Click **Attachments** quick links on the left. Campaign Details-Attachment screen appears.
4. Click **Create**. Create Content screen appears.
5. Select a type of campaign from the Type list. Depending on this selection, the screen is refreshed with other fields.

- a. If you select Image Type:
  - Select a Sub Type from the drop-down list.
  - Enter a File Name.
  - Enter Location.
  - Enter Image Width, Image Height, and/or Alternate Text.
  - Select a Language.
  - Enter a Link to URL. (See [Examples of URL Links](#)).
- b. If you select Text Type
  - Select a Sub Type from the drop-down list.
  - Enter Text.
  - Select a Language
  - Enter a Link to URL. (See [Examples of URL Links](#))

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---

**Note:** For more information about navigating to the iStore screens, see *Oracle iStore and iMarketing Implementation Guide*.

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6. Click **Create**. Campaign Details-Attachment screen appears with the new content type appearing in the table.

## Examples of URL Links

You can enter four different values in **Attachment linkToURL** field. The following list gives examples of URL links that can be entered in the **Attachment linkToURL** field while defining an Attachment in a Campaign.

- Item Detail Page
- Item Shopping Cart Page
- Home Page
- Any other URL

For Item Detail Page, enter **STORE\_CTLG\_ITEM\_ROUTE?item=<itemid>&section=<sectionid>**.

- **STORE\_CTLG\_BUY\_ROUTE** is case-sensitive

- Item Id is an integer like 2035 that denotes the id of the item in the database
- SectionId is not mandatory. It is an integer like 345

For Item Shopping Cart Page, enter **STORE\_CTLG\_BUY\_ROUTE?item=<itemid>**.

Section id is not required to go to a shopping Cart page.

For Home page, enter **STORE\_HOME**.

For any other URL, include all other URLs, except the ones listed above. For example, <http://www.oracle.com>

The following table includes details about the attachment URL

**Table 2–1 Details about the Attachment URL**

Link To	What You Should Enter
Item Detail Page	STORE_CTLG_ITEM_ROUTE? item=<itemid>&section=<sectionid> * section is optional
Shopping Cart Page	STORE_CTLG_BUY_ROUTE? item=<itemid>
Home Page	STORE_HOME
Any other URL	Any other URL

## Viewing or Editing an Affiliate's Posting Preferences

### Default Posting

In the default posting section, specify the posting used by default by the iStore template.

### Affiliate Server URL

This URL is used in the HTML code of the affiliate posting page to display dynamic customized posting on the affiliate page.

### Prerequisites

The user must have user permissions.

## Steps

1. In the Administration tab, choose **Posting**. The current server URL appears in the **Server URL** field. It has the server name, a port number, and a path.
2. To change the URL, type the new URL in the **Server URL** field and click **Update**. Setup complete message appears when the new URL is saved successfully.

---



---

**Note:** If you see an error message, repeat step 2.

---



---

## Style Sheets for Campaigns and Products

iMarketing uses style sheets to define what type of content (image, text etc.) will be displayed and how it will be displayed. The style sheet specification is used to describe a style sheet which processes the XML content delivered by iMarketing and generates HTML for rendering.

The following style sheets are out-of-the-box style sheets provided with Oracle iMarketing. You can also customize these style sheets.

### Style Sheets for Campaigns

#### ibacpns1.xsl

```
<?xml version="1.0"?>
<!--$Header: ibasinglecpripstng1.xsl 115.3 2000/06/21 23:13:39 asaha ship $-->
<!--This stylesheet is for rendering Camapign by its Full Banner image
-->
<!--If a Full Banner-->
<!--image is not available, Half Banner image is tried for. Otherwise, a default
image is -->
<!--shown alongwith short description. The attachment types expected by this
stylesheet are-->
<!--IMG_FULL_BANNER, IMG_HALF_BANNER and TXT_SHORT_DESC-->
<xsl:stylesheet xmlns:xsl="http://www.w3.org/1999/XSL/Transform" version="1.0">
<xsl:template match="/">
  <table border="0" cellpadding="1" cellspacing="2">
    <xsl:apply-templates select="//Campaign"/>
  </table>
</xsl:template>
<xsl:template match="Campaign">
  <tr>
```

```

<td>
  <table border="0" cellpadding="2" cellspacing="0" align="center">
    <tr></tr>
    <xsl:choose>
      <xsl:when test="AttachmentLst/Attachment/AttachmentSubType='IMG_FULL_
BANNER'">
        <!--got a full banner image for this Campaign-->
        <xsl:for-each
select="AttachmentLst/Attachment[starts-with(AttachmentSubType, 'IMG_FULL_
BANNER')]">
          <tr>
            <td>
              <xsl:call-template name="IMAGE"/>
            </td>
          </tr>
        </xsl:for-each>
      </xsl:when>
      <xsl:when test="AttachmentLst/Attachment/AttachmentSubType='IMG_HLF_
BANNER'">
        <!--got a half banner image for this Campaign-->
        <xsl:for-each
select="AttachmentLst/Attachment[starts-with(AttachmentSubType, 'IMG_HLF_
BANNER')]">
          <tr>
            <td>
              <xsl:call-template name="IMAGE"/>
            </td>
          </tr>
        </xsl:for-each>
      </xsl:when>
      <xsl:otherwise>
        <!--no full or half banner image available for this Campaign-->
        <xsl:for-each
select="AttachmentLst/Attachment[starts-with(AttachmentSubType, 'TXT_DESC')]">
          <tr>
            <td>
              <xsl:call-template name="TEXT"/>
            </td>
          </tr>
        </xsl:for-each>
      </xsl:otherwise>
    </xsl:choose>
  </table>
</td>
</tr>

```

```

</xsl:template>
<xsl:template name="IMAGE">
  <xsl:variable name="height">
    <xsl:value-of select="floor(child::DisplayHeight)"/>
  </xsl:variable>
  <xsl:variable name="width">
    <xsl:value-of select="floor(child::DisplayWidth)"/>
  </xsl:variable>
  <xsl:element name="a">
    <xsl:attribute name="href">
      <xsl:value-of select="child::linkURL"/>
    </xsl:attribute>
    <xsl:element name="img">
      <xsl:attribute name="src">
        <xsl:value-of select="child::FileLocation"/>
      </xsl:attribute>
      <xsl:attribute name="alt">
        <xsl:value-of select="child::AlternateText"/>
      </xsl:attribute>
      <!--add height attribute if non-zero and number-->
      <xsl:if test="not($height='NaN')">
        <xsl:if test="not($height='0')">
          <xsl:attribute name="height">
            <xsl:value-of select="$height"/>
          </xsl:attribute>
        </xsl:if>
      </xsl:if>
      <!--add width attribute if non-zero and number-->
      <xsl:if test="not($width='NaN')">
        <xsl:if test="not($width='0')">
          <xsl:attribute name="width">
            <xsl:value-of select="$width"/>
          </xsl:attribute>
        </xsl:if>
      </xsl:if>
      <xsl:attribute name="border">
        <xsl:text>0</xsl:text>
      </xsl:attribute>
    </xsl:element>
  </xsl:element>
</xsl:template>
<xsl:template match="TEXT">
  <xsl:element name="a">
    <xsl:element name="img">
      <xsl:attribute name="src">

```

```

        <!--default image source file name-->
        <xsl:text></xsl:text>
    </xsl:attribute>
    <xsl:attribute name="alt">
        <!--default image alternate text-->
        <xsl:text></xsl:text>
    </xsl:attribute>
</xsl:element>
</xsl:element>
<br>
</br>
<!--place the Campaign's short description here-->
<xsl:element name="a">
    <xsl:attribute name="href">
        <xsl:value-of select="child::linkURL"/>
    </xsl:attribute>
    <xsl:value-of select="child::DisplayText"/>
</xsl:element>
</xsl:template>
<xsl:template match="*"></xsl:template>
</xsl:stylesheet>

```

## ibacpns2.xsl

```

<?xml version="1.0"?>
<!--$Header: ibasinglecpnpstng2.xsl 115.3 2000/06/21 23:13:39 asaha ship $-->
<!--This stylesheet is for rendering Camapign by its short description,
description-->
<!--and Micro Button image.The attachment types expected by this stylesheet
are-->
<!--TXT_SHORT_DESC, TXT_DESC and IMG_MICRO_BUTTON-->
<xsl:stylesheet xmlns:xsl="http://www.w3.org/1999/XSL/Transform" version="1.0">
<xsl:template match="/">
    <table border="0" cellpadding="1" cellspacing="2">
        <xsl:apply-templates select="//Campaign"/>
    </table>
</xsl:template>
<xsl:template match="Campaign">
    <tr>
        <td>
            <table border="0" cellpadding="2" cellspacing="0" align="center">
                <tr></tr>
                <xsl:for-each
select="AttachmentLst/Attachment [starts-with(AttachmentSubType, 'TXT_DESC')]">
                    <tr>

```

```

        <td>
            <xsl:call-template name="SHORTDESC"/>
        </td>
    </tr>
</xsl:for-each>
<xsl:for-each
select="AttachmentLst/Attachment [starts-with (AttachmentSubType, 'TEXT_LONG_
DESC' ) ]">
    <tr>
        <td>
            <xsl:call-template name="DESC"/>
        </td>
    </tr>
</xsl:for-each>
<xsl:for-each
select="AttachmentLst/Attachment [starts-with (AttachmentSubType, 'IMG_MICRO_
BUTTON' ) ]">
    <tr>
        <td>
            <xsl:call-template name="IMAGE"/>
        </td>
    </tr>
</xsl:for-each>
</table>
</td>
</tr>
</xsl:template>
<xsl:template name="IMAGE">
    <xsl:variable name="height">
        <xsl:value-of select="floor (child::DisplayHeight)"/>
    </xsl:variable>
    <xsl:variable name="width">
        <xsl:value-of select="floor (child::DisplayWidth)"/>
    </xsl:variable>
    <xsl:element name="a">
        <xsl:attribute name="href">
            <xsl:value-of select="child::linkURL"/>
        </xsl:attribute>
        <xsl:element name="img">
            <xsl:attribute name="src">
                <xsl:value-of select="child::FileLocation"/>
            </xsl:attribute>
            <xsl:attribute name="alt">
                <xsl:value-of select="child::AlternateText"/>
            </xsl:attribute>
        </xsl:element>
    </xsl:element>

```

```

<!--add height attribute if non-zero and number-->
<xsl:if test="not($height='NaN')">
  <xsl:if test="not($height='0')">
    <xsl:attribute name="height">
      <xsl:value-of select="$height"/>
    </xsl:attribute>
  </xsl:if>
</xsl:if>
<!--add width attribute if non-zero and number-->
<xsl:if test="not($width='NaN')">
  <xsl:if test="not($width='0')">
    <xsl:attribute name="width">
      <xsl:value-of select="$width"/>
    </xsl:attribute>
  </xsl:if>
</xsl:if>
<xsl:attribute name="border">
  <xsl:text>0</xsl:text>
</xsl:attribute>
</xsl:element>
</xsl:element>
</xsl:template>
<xsl:template name="SHORTDESC">
  <xsl:element name="a">
    <xsl:attribute name="href">
      <xsl:value-of select="child::linkURL"/>
    </xsl:attribute>
    <xsl:value-of select="child::DisplayText"/>
  </xsl:element>
</xsl:template>
<xsl:template name="DESC">
  <xsl:element name="a">
    <xsl:value-of select="child::DisplayText"/>
  </xsl:element>
</xsl:template>
<xsl:template match="*"></xsl:template>
</xsl:stylesheet>

```

### ibacpnm3.xsl

```

<?xml version="1.0"?>
<!--$Header: ibamultiplecpnpstng3.xsl 115.3 2000/06/21 23:13:39 asaha ship $-->
<!--This stylesheet is for rendering Camapign list. Every Campaign in the
list-->
<!--has its short desription and micro button image.The attachment types

```

```

expected by-->
<!--this stylesheet are TXT_SHORT_DESC and IMG_MICRO_BUTTON-->

<xsl:stylesheet xmlns:xsl="http://www.w3.org/1999/XSL/Transform" version="1.0">
<xsl:template match="/">
  <table border="0" cellpadding="1" cellspacing="2">
    <xsl:apply-templates select="//Campaign"/>
  </table>
</xsl:template>
<xsl:template match="Campaign">
  <tr>
    <td>
      <table border="0" cellpadding="2" cellspacing="0" align="center">
        <tr>
          <xsl:for-each
select="AttachmentLst/Attachment[starts-with(AttachmentSubType, 'TXT_DESC')]">
            <td>
              <xsl:call-template name="TEXT"/>
            </td>
          </xsl:for-each>
          <xsl:for-each
select="AttachmentLst/Attachment[starts-with(AttachmentSubType, 'IMG_MICRO_
BUTTON')]">
            <td>
              <xsl:call-template name="IMAGE"/>
            </td>
          </xsl:for-each>
        </tr>
      </table>
    </td>
  </tr>
</xsl:template>
<xsl:template name="IMAGE">
  <xsl:variable name="height">
    <xsl:value-of select="floor(child::DisplayHeight)"/>
  </xsl:variable>
  <xsl:variable name="width">
    <xsl:value-of select="floor(child::DisplayWidth)"/>
  </xsl:variable>
  <xsl:element name="a">
    <xsl:attribute name="href">
      <xsl:value-of select="child::linkURL"/>
    </xsl:attribute>
    <xsl:element name="img">
      <xsl:attribute name="src">

```

```

        <xsl:value-of select="child::FileLocation"/>
    </xsl:attribute>
    <xsl:attribute name="alt">
        <xsl:value-of select="child::AlternateText"/>
    </xsl:attribute>
    <!--add height attribute if non-zero and number-->
    <xsl:if test="not($height='NaN')">
        <xsl:if test="not($height='0')">
            <xsl:attribute name="height">
                <xsl:value-of select="$height"/>
            </xsl:attribute>
        </xsl:if>
    </xsl:if>
    <!--add width attribute if non-zero and number-->
    <xsl:if test="not($width='NaN')">
        <xsl:if test="not($width='0')">
            <xsl:attribute name="width">
                <xsl:value-of select="$width"/>
            </xsl:attribute>
        </xsl:if>
    </xsl:if>
    <xsl:attribute name="border">
        <xsl:text>0</xsl:text>
    </xsl:attribute>
</xsl:element>
</xsl:element>
</xsl:template>
<xsl:template name="TEXT">
    <xsl:element name="a">
        <xsl:attribute name="href">
            <xsl:value-of select="child::linkURL"/>
        </xsl:attribute>
        <xsl:value-of select="child::DisplayText"/>
    </xsl:element>
</xsl:template>
<xsl:template match="*"></xsl:template>
</xsl:stylesheet>

```

## Style Sheets for Products

### ibaprod1.xsl

```

<?xml version="1.0"?>
<!--$Header: ibaproductpstng1.xsl 115.3 2000/06/21 23:13:39 asaha ship $-->

```

```

<!--This stylesheet is for rendering Product list. The properties of Product-->
<!--object accessed here are ProductDetailLink and ShortDescription.-->
<xsl:stylesheet xmlns:xsl="http://www.w3.org/1999/XSL/Transform" version="1.0">
<xsl:template match="/">
  <table border="0" cellpadding="1" cellspacing="2">
    <xsl:apply-templates select="//Product"/>
  </table>
</xsl:template>
<xsl:template match="Product">
  <tr>
    <td>
      <table border="0" cellpadding="2" cellspacing="0" align="center">
        <tr>
          <td>
            <xsl:element name="a">
              <xsl:attribute name="href">
                <xsl:value-of select="child::ProductDetailLink"/>
              </xsl:attribute>
              <xsl:value-of select="child::ShortDescription"/>
            </xsl:element>
          </td>
        </tr>
      </table>
    </td>
  </tr>
</xsl:template>
<xsl:template match="*"></xsl:template>
</xsl:stylesheet>

```

## ibaproduct2.xsl

```

<?xml version="1.0"?>
<!--$Header: ibaproductpstng2.xsl 115.3 2000/06/21 23:13:39 asaha ship $-->
<!--This stylesheet is for rendering Product list. The properties of Product
object -->
<!--accessed here are ProductDetailLink, ShortDescription and ThumbNail
image.-->
<xsl:stylesheet xmlns:xsl="http://www.w3.org/1999/XSL/Transform" version="1.0">
<xsl:template match="/">
  <table border="0" cellpadding="1" cellspacing="2">
    <xsl:apply-templates select="//Product"/>
  </table>
</xsl:template>
<xsl:template match="Product">
  <tr>

```

```

<td>
  <table border="0" cellpadding="2" cellspacing="0" align="center">
    <tr>
      <td>
        <xsl:element name="a">
          <xsl:attribute name="href">
            <xsl:value-of select="child::ProductDetailLink"/>
          </xsl:attribute>
          <xsl:value-of select="child::ShortDescription"/>
        </xsl:element>
      </td>
      <td>
        <xsl:element name="a">
          <xsl:element name="img">
            <xsl:attribute name="src">
              <xsl:value-of select="child::ThumbNail"/>
            </xsl:attribute>
            <xsl:attribute name="alt">
              <xsl:text></xsl:text>
            </xsl:attribute>
            <xsl:attribute name="border">
              <xsl:text>0</xsl:text>
            </xsl:attribute>
          </xsl:element>
        </xsl:element>
      </td>
    </tr>
  </table>
</td>
</tr>
</xsl:template>
<xsl:template match="*"></xsl:template>
</xsl:stylesheet>

```

### ibaproduct3.xsl

```

<?xml version="1.0"?>
<!--$Header: ibaproductpstng3.xsl 115.3 2000/06/21 23:13:39 asaha ship $-->
<!--This stylesheet is for rendering Product list. The properties of Product
object -->
<!--accessed here are ProductDetailLink, ShortDescription, ThumbNail image,
Description-->
<!--and Shopping Cart Link.-->
<xsl:stylesheet xmlns:xsl="http://www.w3.org/1999/XSL/Transform" version="1.0">
<xsl:template match="/">

```

```

        <table border="0" cellpadding="1" cellspacing="2">
          <xsl:apply-templates select="//Product"/>
        </table>
</xsl:template>
<xsl:template match="Product">
  <!--row for Thumbnail image and short description-->
  <tr>
    <td>
      <table border="0" cellpadding="2" cellspacing="0" align="left">
        <tr>
          <td>
            <xsl:element name="a">
              <xsl:element name="img">
                <xsl:attribute name="src">
                  <xsl:value-of select="child::Thumbnail"/>
                </xsl:attribute>
                <xsl:attribute name="alt">
                  <xsl:text></xsl:text>
                </xsl:attribute>
                <xsl:attribute name="border">
                  <xsl:text>0</xsl:text>
                </xsl:attribute>
              </xsl:element>
            </xsl:element>
          </td>
          <td>
            <xsl:element name="a">
              <xsl:attribute name="href">
                <xsl:value-of select="child::ProductDetailLink"/>
              </xsl:attribute>
              <xsl:value-of select="child::ShortDescription"/>
            </xsl:element>
          </td>
        </tr>
      </table>
    </td>
  </tr>
  <!--row for product detail page and shopping cart link-->
  <tr>
    <td>
      <table border="0" cellpadding="2" cellspacing="0" align="left">
        <!--row for description-->
        <tr>
          <td>
            <xsl:element name="a">

```

```

        <xsl:value-of select="child::Description"/>
    </xsl:element>
</td>
</tr>
<tr>
<td>
    <xsl:element name="a">
        <xsl:attribute name="href">
            <xsl:value-of select="child::ShoppingCartLink"/>
        </xsl:attribute>
        <xsl:text>Add To Cart</xsl:text>
    </xsl:element>
</td>
</tr>
</table>
</td>
</tr>
<tr>
<td>
</td>
</tr>
</xsl:template>
<xsl:template match="*"></xsl:template>
</xsl:stylesheet>

```

### ibaproduct4.xsl

```

<?xml version="1.0"?>
<!--$Header: ibaproductpstng3.xsl 115.3 2000/06/21 23:13:39 asaha ship $-->
<!--This stylesheet is for rendering Product list. The properties of Product
object -->
<!--accessed here are ProductDetailLink, ShortDescription, Small image,
Description-->
<!--and Shopping Cart Link.-->
<xsl:stylesheet xmlns:xsl="http://www.w3.org/1999/XSL/Transform" version="1.0">
<xsl:template match="/">
    <table border="0" cellpadding="1" cellspacing="2">
        <xsl:apply-templates select="//Product"/>
    </table>
</xsl:template>
<xsl:template match="Product">
    <!--row for Thumbnail image and short description-->
    <tr>
        <td>
            <table border="0" cellpadding="2" cellspacing="0" align="left">

```

```

        <tr>
          <td>
            <xsl:element name="a">
              <xsl:element name="img">
                <xsl:attribute name="src">
                  <xsl:value-of select="child::SmallImage"/>
                </xsl:attribute>
                <xsl:attribute name="alt">
                  <xsl:text></xsl:text>
                </xsl:attribute>
                <xsl:attribute name="border">
                  <xsl:text>0</xsl:text>
                </xsl:attribute>
              </xsl:element>
            </xsl:element>
          </td>
          <td>
            <xsl:element name="a">
              <xsl:attribute name="href">
                <xsl:value-of select="child::ProductDetailLink"/>
              </xsl:attribute>
              <xsl:value-of select="child::ShortDescription"/>
            </xsl:element>
          </td>
        </tr>
      </table>
    </td>
  </tr>
  <!--row for product detail page and shopping cart link-->
  <tr>
    <td>
      <table border="0" cellpadding="2" cellspacing="0" align="left">
        <!--row for description-->
        <tr>
          <td>
            <xsl:element name="a">
              <xsl:value-of select="child::Description"/>
            </xsl:element>
          </td>
        </tr>
        <tr>
          <td>
            <xsl:element name="a">
              <xsl:attribute name="href">
                <xsl:value-of select="child::ShoppingCartLink"/>
              </xsl:attribute>
            </xsl:element>
          </td>
        </tr>
      </table>
    </td>
  </tr>

```

```
        </xsl:attribute>
        <xsl:text>Add To Cart</xsl:text>
    </xsl:element>
</td>
</tr>
</table>
</td>
</tr>
<tr>
    <td>
        </td>
    </tr>
</xsl:template>
<xsl:template match="*"></xsl:template>
</xsl:stylesheet>
```



# A

---

---

## iMarketing User Interface Reference

This topic group provides descriptions of user interface tabs, screens, forms, and fields for the Oracle iMarketing application.

## Postings

Use the Postings screen to view a list of postings or to remove postings from the list. These postings can be displayed either on a merchant’s web site or on an affiliate’s web site.

Postings <span style="float: right;">Create</span>					
Remove	Name	Description	Status	Rule Set	Posting On
<input type="checkbox"/>	<a href="#">testing posting</a>	sssss	Active	<a href="#">testing rules</a>	Store
<input type="checkbox"/>	<a href="#">Product Recom Posting</a>	Testing Product Recommendation	Active	<a href="#">Product Recom</a>	Store
<input type="checkbox"/>	<a href="#">Cabo Posting</a>	Testing Cabo Display	Active	<a href="#">Cabo RuleSet</a>	Store
<input type="checkbox"/>	<a href="#">AffiliatePosting2</a>	AffiliatePosting2	Active	<a href="#">IBARUP2 RuleSet</a>	AT&T Universal Card
<input type="checkbox"/>	<a href="#">PatchSet C Posting</a>	Testing PatchSet C	Active	<a href="#">PatchSetTestRuleSet2</a>	Store
<input type="checkbox"/>	<a href="#">DemoProductDetailPosting</a>	Don't delete	Active	<a href="#">DemoProductDetail</a>	Store
<input type="checkbox"/>	<a href="#">DemoShoppingCartPosting</a>	Don't delete	Active	<a href="#">DemoShoppingCart</a>	Store
<input type="checkbox"/>	<a href="#">DemoHomePagePosting</a>	Don't delete	Active	<a href="#">DemoHomePage</a>	Store
<input type="checkbox"/>	<a href="#">checkpoint1</a>	test winrunner	Active	-	Store
<input type="checkbox"/>	<a href="#">ProductNew posting</a>	Testing new functionality	Active	<a href="#">Product New</a>	Store

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**Table A-1 Postings Screen UI Reference**

<b>UI Object Name</b>	<b>Type</b>	<b>Description/Usage</b>
Remove	Checkbox	Click the Remove button adjacent to the posting that you want to remove from the list.
Name, Status, Rule Set, Posting On	Column heading	Click to sort postings.
Description	Column heading	Details about the posting.
Create	Button	Click to navigate to the Create Postings screen.
Posting Name (e.g, testing posting)	Hyperlink	Click the name of a posting to navigate to the posting details screen for that posting.
Rule Set Name	Hyperlink	Click the name of a rule set to navigate to the rule set details screen for that rule set.
Update	Button	Click Update to refresh the Postings screen with the changes.
Restore	Button	Click this button to restore the screen to its settings before the last changes.

**See Also**

[Understanding Postings](#)

[Creating a Posting](#)

## Affiliate

Use the Affiliate screen to view a list of affiliates registered with a merchant.

Affiliates			Create
Name	Country	▼ Creation Date	
<a href="#">ORCL111</a>	US	12-DEC-2000	
<a href="#">Seminoles</a>	US	12-DEC-2000	
<a href="#">green house</a>	US	08-DEC-2000	
<a href="#">Penny1 Enterprises</a>	US	07-DEC-2000	
<a href="#">sanity test</a>	US	06-DEC-2000	
<a href="#">ggggggg</a>	US	06-DEC-2000	
<a href="#">ffbus1org</a>	US	06-DEC-2000	
<a href="#">Add Company</a>	US	05-DEC-2000	
<a href="#">Sullivan Enterprises</a>	US	04-DEC-2000	
<a href="#">1234</a>	US	04-DEC-2000	

First | Previous 1 - 10 out of 333 Next | Last

**Table A-2 Affiliate Screen UI Reference**

UI Object Name	Type	Description/Usage
Name, Country, Creation Date	Column Heading	Click to sort affiliates.
Affiliate Name (e.g., ORCL111)	Hyperlink	Click to view affiliate details.
Create	Button	Click to navigate to the Create Affiliates screen.

### See Also

[Understanding Affiliates](#)

[Creating an Affiliate](#)

## Rule Sets

Use the Rule Sets screen to view a list of rule sets or to remove one or more rule sets from the list.

**Rule Sets** [Create](#)

Remove	Name	Description
<input type="checkbox"/>	<a href="#">Sujatha's Ruleset</a>	Testing
<input type="checkbox"/>	<a href="#">ImadRS</a>	1
<input type="checkbox"/>	<a href="#">HomepageRuleset</a>	Testing homepage
<input type="checkbox"/>	<a href="#">ShoppingCart_Ruleset</a>	Testing SC
<input type="checkbox"/>	<a href="#">Section_Ruleset</a>	Testing Section
<input type="checkbox"/>	<a href="#">Product_Rulesets</a>	Testing Product
<input type="checkbox"/>	<a href="#">SC_Products_Rulesets</a>	The display will be based on the product in the shopping cart
<input type="checkbox"/>	<a href="#">allpersonruleset</a>	allpersonruleset. PLEASE DO NOT DELETE!!!!!!
<input type="checkbox"/>	<a href="#">SilverSegmentRules</a>	The display is for people in the silver segment
<input type="checkbox"/>	<a href="#">GoldRulesets</a>	This is for gold customers

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[Update](#) [Clear](#)

**Table A-3 Rule Sets Screen UI Reference**

UI Object Name	Type	Description/Usage
Remove	Checkbox	Click in the box in the Remove column adjacent to the Rule Set that you want to remove.
Name	Column Heading	Use to sort rule sets by name.
Create	Button	Click to begin the process of creating a new rule set.
Update	Button	Click to update the screen with the changes.
Clear	Button	Click to clear the screen with the latest changes or updates.

### See Also

[Understanding Rule Sets](#)

## Creating Rule Sets

# Create Affiliate

Use the Create Affiliate screen to create a new affiliate.

**Create Affiliate**

\* Name

---

**Company Information**

\* Address

Address2

Address3

\* City  \* State

\* Postal Code  \* Country

\* Indicates required fields.

**Table A-4 Create Affiliate Screen UI Reference**

UI Object Name	Type	Description/Usage
Name	Field	Enter the name of the affiliate. The maximum length of the affiliate name can be 255 characters.
Company Information	Section	Enter mailing address information for the affiliate. It includes three fields for address and one each for city, state, postal code, and country.
Create	Button	Click after entering the required information in the form fields.

### See Also

[Understanding Affiliates](#)

[Managing Affiliates](#)

## Administration

Use the Administration screen to view or edit an affiliate's posting preferences.

Affiliate Server URL

Default Posting Name:

Posting Identifier: 10563

**Table A-5 Administration Screen UI Reference**

UI Object Name	Type	Description/Usage
Affiliate Server URL	Field	URL used in the HTML code of the affiliate posting page to display a dynamic customized posting on the affiliate pages.
Default Posting Name	Field	The posting used by default by the iStore template.
Posting Identifier	Field	Unique number identifying each posting.
Update	Button	Click to update the screen with the changes or edits.
Restore	Button	Click to restore the last settings on this screen.

## Rule Set Detail

Use the Rule Set Detail screen to view details about a selected rule set.

Rule Set Detail

\*Rule Set Name

\*Description

Content

\* Content type

\* Maximum No. of Product Displayed

Rules

Remove	Rule Name	Execution Order	Rule Condition	Content Selector
<input type="checkbox"/>	r1	1	Customer Status Anonymous Service for Products being viewed	

\* Indicates required field

**Table A-6 Rule Set Detail Screen Reference**

<b>UI Object Name</b>	<b>Type</b>	<b>Description/Usage</b>
Rule Set Name	Field	Name of the selected rule set.
Description	Field	Description about the rule set.
Content	Section	This section contains the content details.
Content Type	Field	The content type that was selected while creating a rule set.
Maximum Number of Product/Campaign Displayed	Field	The number that was selected while creating this rule set.
Rules	Section	This section contains the details about the rules attached to this rule set.
Add New Rule	Button	Click to navigate to the Edit Rule screen to add a new rule to this rule set.
Update	Button	Click to update the screen with the changes or edits.
Restore	Button	Click to restore the screen to its settings before the last changes.

**See Also**

[Understanding Rule Sets](#)

[Creating Rule Sets](#)

## Create Rule Set

Use the Create Rule Set screen to create a new rule set.

**Table A-7 Create Rule Set Screen Reference**

UI Object Name	Type	Description/Usage
Rule Set Name	Field	Name of the new rule set.
Description	Field	Details about the rule set.
Content	Section	This section contains details about the content type and the maximum number of content displayed.
Content Type	Radio button	Select either campaign or product.
Maximum No. of Content Displayed	Field	The maximum number of products or campaigns that will be displayed in a posting.
Rules	Section	This section contains the rule details.
Add New Rule	Button	Click this button to navigate to the Edit Rule screen to create a new rule.
Create	Button	Click after entering information in the other fields to create a new rule set.

**See Also**[Understanding Rule Sets](#)[Managing Rule Sets and Rules](#)

## Posting Detail

Use the Posting Detail screen to view details about a selected posting.

**Posting Detail**

\* Name

Posting Identifier : 10445

Creation Date : 08-NOV-2000

Posting On : Store

\* Description

Status

**Content Detail**

\* Rule Set

\* Rendering Style

\* Indicates required field

**Table A-8 Posting Detail Screen Reference**

UI Object Name	Type	Description/Usage
Name	Field	Name of the selected posting.
Posting Identifier	Field	Unique number identifying the posting.
Creation Date	Field	The date on which the posting was created.
Posting On	Field	The selection made while creating a posting.
Description	Field	Details about the posting.

**Table A-8 Posting Detail Screen Reference**

<b>UI Object Name</b>	<b>Type</b>	<b>Description/Usage</b>
Status	Drop down box	The selection made while creating a posting.
Content Detail	Section	Details about the rule set and the rendering style sheet that is attached to a posting.
Rule Set	Field	The rule set associated to a posting.
Rendering Style		The rendering style sheet associated with a posting.
Update	Button	Click to update the screen with the changes.
Restore	Button	Click to restore the screen to its settings before the last changes.
Copy	Button	Click to duplicate the information for another posting.

**See Also**[Understanding Postings](#)[Creating a Posting](#)

## Customer Segment

Use the Customer Segment screen in the process of adding or editing a rule to view a list of available customer segments and to select the customer segment to be associated with this rule.

Customer Segment

Search by:

Add	▼ Customer Segment	Description	Owner	Parent
<input type="checkbox"/>	////////		Abbott, Ms. Lorraine	
<input type="checkbox"/>	www		Abbott, Ms. Lorraine	10021
<input type="checkbox"/>	www		Abbott, Ms. Lorraine	
<input type="checkbox"/>	sanity segment		Abbott, Ms. Lorraine	
<input type="checkbox"/>	newuser		Armstrong, Mr. Billie Joe	
<input type="checkbox"/>	iMac_Segment		Abbott, Ms. Lorraine	
<input type="checkbox"/>	eeee		Abbott, Ms. Lorraine	10020
<input type="checkbox"/>	cabo segment		Abbott, Ms. Lorraine	
<input type="checkbox"/>	Test_GATEAM		Adams, Mr. Brian	
<input type="checkbox"/>	Test_QA		Abbott, Ms. Rachel (Rachel)	

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**Table A-9 Customer Segment Screen Reference**

UI Object Name	Type	Description/Usage
Add	Radio button	Click the button adjacent to the customer segment that you want to add.
Customer Segment	Column heading	List of available customer segments.
Description	Column heading	Details about the customer segment.
Owner	Column heading	The name of the person who created this customer segment. This field can be edited.
Parent	Column heading	Parent segment in the hierarchy.
Add	Button	Click to return to the Edit Rule screen. The selections that you make appear on the Edit Rule screen.

**See Also**  
[Creating Rules](#)

## Specialty Store

Use the Specialty Store screen in the process of adding a new rule or editing a rule to select the specialty store that you want to attach to this rule.

Specialty Store

Search by:

Add	▼ Specialty Store	Description
<input type="checkbox"/>	savio_section_search	section search test
<input type="checkbox"/>	imactest	imac test
<input type="checkbox"/>	al satchu QA - iStore	Al Satchu - iStore QA work for rstoney team
<input type="checkbox"/>	WinRunner Test Store	This is a test store for automated testing
<input type="checkbox"/>	Sujatha_Store	PLEASE DO NOT DELETE!!!!!!
<input type="checkbox"/>	Sri's Store	Sri's Store
<input type="checkbox"/>	Sample Specialty Store	Imad's Sample Specialty Store
<input type="checkbox"/>	Master Minisite	Master Minisite
<input type="checkbox"/>	Mairead specialty/mini site	Mairead specialty/mini site
<input type="checkbox"/>	Mairead 2nd Store	eteyrmysyh

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**Table A–10 Specialty Store Screen Reference**

UI Object Name	Type	Description/Usage
Add	Radio button	Click the button adjacent to the specialty store that you want to add to this rule. You can select more than one specialty store.
Specialty Store	Column heading	List of available specialty stores.
Description	Column heading	Details about a specialty store.
Add	Button	Click to return to the Edit Rule screen. The selections that you make appear on the Edit Rule screen.

**See Also**  
[Creating Rules](#)

## Create Posting

Use the Create Posting screen to create a new posting that will appear either on a merchant's web site or on an affiliate's site.

### Create Posting

\* Name

\* Description

Posting On

Status

---

**Content Detail**

Rule Set

Rendering Style

\* Indicates required field

**Table A-11 Create Posting Screen Reference**

<b>UI Object Name</b>	<b>Type</b>	<b>Description/Usage</b>
Name	Field	Name of the new posting.
Description	Field	Details about the posting.
Posting On	Drop down box	Select either store or affiliate site, depending on where you want the posting to appear.
Status	Drop down box	Select either active or inactive.
Content Detail	Section	Contains the Rule Set field and the Rendering Style fields.
Rule Set	Field	Select the rule set to be associated to this posting.
Rendering Style	Field	Enter a rendering style sheet name to be associated to this posting.
Create	Button	Click after entering information in the mandatory fields.
Clear	Button	Click to clear the information entered on the screen.

**See Also**

[Understanding Postings](#)

## Edit Rule

Use the Edit Rule screen to either create a new rule to be added to the rule set or to edit rule parameters about an existing rule. The fields appearing on this screen depend on the selections made in the Create Rule Set screen.

### Edit Rule

**Rule Set in Progress:** ruleset 1  
**Rule Set Description:** demo

---

\* Rule Name:

\* Execution Order:

\* Description:

---

#### Content Selection

select the appropriate criteria to be used to select content for display

Type:

Campaign Type  Promotions  Advertisements

Product Context:

Relationship:

**Conditions** \_\_\_\_\_  
 Specify one or more targeting conditions that are required to hold true for the above selection criteria to be used

**Visitor Type** \_\_\_\_\_  
 Registered, with Order History  Registered, no Order History  Anonymous

**Customer Segment** \_\_\_\_\_  
Add

Remove	Customer Segment	Description	Owner	Parent
--------	------------------	-------------	-------	--------

**Specialty Store** \_\_\_\_\_  
Add

Remove	Specialty Store	Description
--------	-----------------	-------------

**Shopping Cart** \_\_\_\_\_  
 Condition for Empty Shopping Cart

---

\* Indicates required field

Done Restore

**Table A-12 Edit Rule Screen Reference**

UI Object Name	Type	Description/Usage
Rule Name	Field	Name of the rule being created or edited.
Execution Order	Field	The order in which this rule will be executed.
Description	Field	Details about the rule.
Content Selection or Product Selection	Section	Either of these sections and the fields in each appear depending on the selections made in the Create Rule Set screen.

**Table A–12 Edit Rule Screen Reference**

<b>UI Object Name</b>	<b>Type</b>	<b>Description/Usage</b>
Conditions	Section	Contains the various conditions that can be associated with a rule.
Visitor Type	Sub section	Select either Registered, with Order History; Registered, no Order History; or Anonymous.
Customer Segment	Sub section	Click the Add button in this section to navigate to the Customer Segment screen and select the customer segment to be associated with this rule.
Specialty Store	Sub section	Click the Add button in this section to navigate to the Specialty Store screen and select the specialty store to be associated with this rule.
Shopping Cart	Sub Section	Click the Condition for Empty Shopping Cart to add this condition to the rule.
Done	Button	Click to save the new rule or to save the changes made to the rule.
Restore	Button	Click to restore the screen to its settings before the last changes.

**See Also**  
[Creating Rules](#)

## Affiliate Details

Use the Affiliate Details screen to view details about a selected affiliate.

**Affiliate Details**

\* Name

Registration ID 4699

Registration Date 04-DEC-2000

**Company Information**

---

\* Address

Address2

Address3

\* City  \* State

\* Postal Code  \* Country

\* Indicates required fields.

**Table A-13 Affiliate Details Screen Reference**

UI Object Name	Type	Description/Usage
Name	Field	Name of the affiliate.
Registration ID	Field	Unique number given to each affiliate to identify the affiliate.
Registration Date	Field	Date on which the affiliate is registered with the merchant.
Company Information	Section	Contains the affiliate address, City, State, Postal Code and Country.
Update	Button	Click to update the screen with the last changes.
Restore	button	Click to restore the screen to its settings before the last changes.

### See Also

[Creating an Affiliate](#)

[Viewing or Editing an Affiliate](#)